

Acquisition Plan/Request for Contract " (Title of Project) "

PART I - To Be Completed By Program Office

A. IDENTIFICATION

1. Program Office: (Identify the Directorate, Division or Office, Section, Branch, etc. responsible for the proposed contract project. Note that this is not necessarily the proposed Program Officer's organization. The key determinant may be whose funds are being obligated or who is responsible for managing multiple sources of funds.)
2. Project Management
 - a. Proposed Program Officer: (Name, Title, Organization, Mailing Address, Telephone Number, FAX Number, other electronic transmission identification)
 - b. Proposed Alternate Program Officer: (Same information as required above for proposed Program Officer)
 - c. Official Responsible for Technical Proposal Evaluation: (Name, Title, Organization, Mailing Address, Telephone Number, FAX Number, other electronic transmission identification)
3. Project Title: (Same as title in subject line of transmittal memorandum)

B. DESCRIPTION

1. Background
 - a. Purpose: (Include a brief, general description of the requirements, including the citation of the legislation which authorizes the program or project and a statement as to the intended purpose/use of the proposed contract)
 - b. History and Need: (Provide a brief, factual summary of the technical and contractual history of the supplies or services being acquired and identify the necessity for the proposed contract.
 - c. Future Requirements: (Discuss any anticipated future requirements related to the acquisition.)
2. Requirement Specifics

- a. Phasing and Performance Period: (Briefly describe the discrete tasks or stages of accomplishment which could be susceptible to phasing. Also describe the criteria for evaluation of performance of each phase before proceeding to the next. Identify the number of months or other time period required for total performance and, if applicable, for each phase of work indicated in the statement of work. Indicate the desired start date and any required delivery dates.)
- b. Statement of Work for Solicitation Purposes - See Attachment (#)
- c. Deliverables: (Include anticipated deliverables and time(s) for delivery. Specific description of deliverables, including any technical or financial progress and final reports, should be identified in the Statement of Work)
- d. Government Furnished Material: (List, by title, and description, study reports, plans, drawings, and other data to be made available to prospective offerors for use in preparation of proposals or the contractor for use in performance of the contract. Indicate whether this material is currently available or when it will be available. Identify, as referenced in the work statement, the types, individual items, and quantities of Government property to be furnished to or allowed to be acquired by the resultant contractor, if known. Again, specify when Government property is to be made available to the resultant contractor. Indicate any associated problems which may be encountered in furnishing material, facilities, or property and discuss any possible inequities which may arise. Discuss screening efforts for availability through GSA excess property schedules.)
- e. Data: (Identify and discuss data expected to be developed or generated by the contract, specifying that data which is to be delivered and that data to be retained by the contractor. Discuss how data will be used, maintained, disclosed, and disposed of by the contractor. Include a statement as to whether or not another acquisition, based upon the data generated by the proposed acquisition, is anticipated and whether or not the data will permit any such follow-on acquisition to be competitive. Identify and discuss data subject to the Privacy Act or Confidentiality of Information clause. Discuss data to be delivered with limited rights, data where title would not vest in the Government, and anticipated copyrights or patents.)

3. Post Award

- a. Administration and Monitoring: (Detail milestones that require periodic evaluation of the contractor's progress. Discuss any formal management systems to be used to monitor the contractor. Discuss any plans for post award conferences or site visits. Delineate the timing of the periodic status reports.)

- b. Replication, Dissemination, or Use of Results: (Discuss anticipated replication, dissemination, or use of results. Describe the user audience and their expected use. Include a description of the delivery system.)

C. COST AND FUNDING

1. Independent-Government Cost Estimate: (The estimate of the total cost of the proposed contract, and if applicable, the estimate for each phase indicated in the work statement, is to be provided. This must include a cost breakdown of all contributing cost factors, to include and estimate of the technical staff hours, direct materials, subcontracting, travel, etc.)
2. Project Funding: (Include the summary of funds expected to be obligated for the entire project by Fiscal Years and phases. Include expenditures for previous years. Discuss the probability of obtaining future years funding or what specific managerial action can be taken to insure future funding, if applicable. This section must include the certification of funds availability for the particular proposed acquisition, along with the appropriation and accounting information citations. When funds are not currently available but are anticipated, a statement indicating that the financial plan includes provision of the funds for the proposed acquisition but the funds are not yet available for obligation shall be included in lieu of the certification of funds availability.)

D. ACQUISITION APPROACH

1. Proposed Source(s): (Identify categories of sources, if apparent, or identify specific potential sources by name and mailing address, if known. Describe how competition will be sought, promoted, and sustained throughout the process. If the proposed acquisition is to be awarded using other than full and open competition, a justification shall be prepared in accordance with FAR and NSF requirements and shall be referenced and attached.)
2. Other Considerations:
 - a. Acquisition vs. Assistance: (Identify what is being acquired for the direct use or benefit of the Government or other circumstance that warrants use of a contract as a contract as the award instrument.)
 - b. Competitive Proposals vs. Sealed Bids: (Discuss why the project requirement cannot be specified sufficiently to allow a "lowest price" award decision and why the opportunity to negotiate should be retained.)

[END OF PART I]

PART II - To Be Completed By Contract Specialist

A. IDENTIFICATION

1. Contract Specialist: (Name, Title, Organization, Mailing Address, Telephone Number, FAX Number, other electronic transmission identification)
2. Project Identification Number: (RFP number to be identified by the Contract Specialist at the acquisition planning meeting)

B. SPECIAL PROGRAM CLEARANCES OR APPROVALS

1. Presolicitation: (Check those clearances or approvals applicable to this acquisition and reference and attach the clearance or approval or request for same.)

- ☐ Automatic Data Processing
- ☐ ADP Systems Security
- ☐ Advisory and Assistance Service
- ☐ Commercial Activity
- ☐ Paid Advertising
- ☐ Printing
- ☐ Fraud, Abuse and Waste
- ☐ Paperwork Reduction Act
- ☐ Contract with Federal Employee
- ☐ Publication
- ☐ Audiovisual-Videotape and Motion Picture Production
- ☐ Privacy Act - P.L. 93-579
- ☐ Surveys
- ☐ National Science Board

2. Preaward:

- ☐ Evaluation of Proposals
- ☐ EEO Clearance
- ☐ Subcontracting Plan
- ☐ Office of General Counsel Preaward Review

C. ACQUISITION APPROACH

1. Contract Type: (Identify and support recommended type, including, if cost plus fixed fee, whether term or completion and why.)

C. ACQUISITION APPROACH, cont.

2. Socioeconomic Programs: (Discuss efforts, including preliminary liaison with the NSF Small Business Specialist, to identify possibilities for set-aside for small, disadvantaged, labor surplus area or women-owned businesses. Provide a full description of the extent of training and experience necessary for required personnel, a listing of any special equipment or facilities needed to perform the project, and, if a recompetition, a brief description of prior small business participation. Identify SIC code as discussed in FAR PART 19.)
3. Other Considerations: (check those that apply)
 - ☐ Service Contract Act
 - ☐ Buy American Act
 - ☐ Organizational Conflict of Interest
 - ☐ Special Voucher Instructions
 - ☐ Insurance - Liability to 3rd Persons
 - ☐ OMB Clearance

[END OF PART II]

PART III - To Be Completed by Program Officer and Contract Specialist

A. TECHNICAL EVALUATION

1. Plan: (Discuss the plans for technical evaluation of the proposal(s).
Discuss whether non-Federal technical evaluators will review the proposals.
Discuss potential conflict of interest situations.)
2. Criteria: (Include the technical evaluation criteria which have been developed based on the requirements of the specific project. Identify weights assigned to each of these areas for technical evaluation purposes. These areas may include understanding of the problem, technical approach, experience, personnel, facilities, etc. Identify relative importance of technical and cost considerations, i.e., is technical merit paramount and cost secondary, etc.)
3. Special Instructions: (Identify any special instructions or information which will assist in the preparation of prospective offerors' technical proposals. Identify and explain any special standards or absolute prerequisites for award and how offers will be evaluated to determine compliance prior to technical evaluation.)
4. Other Considerations:
 - a. Special Clauses: (Identify and support the use of any special terms or conditions not covered by the work statement or "general clause listings" and indicate whether or not a deviation must be approved.)
 - b. Special Circumstances: (Discuss circumstances such as the effect of a protest on a previous acquisition, any special public law or regulatory requirement which places restrictions on the acquisition, or use of any special type of synopsis deemed appropriate.)
 - c. Special Reviews: (Address any planned preproposal conference, preaward survey or preaward site visit plans.)

B. ACQUISITION PLANNING SCHEDULE

<u>Action</u>	<u>Planned Date</u>
01. RFC Received in CPO	30 days after CS/PO initial planning meeting
02. Presolicitation Reviews Completed	14 days
03. RFP Availability Synopsis Published	2 days

- 04. RFP Issued 20 days
- 05. RFP Closed 30 days (minimum)

B. ACQUISITION PLANNING SCHEDULE

<u>Action</u>	<u>Planned Date</u>
06. Receipt of Technical Evaluation	30 days
07. Receipt/Completion of Cost Analysis	30 days
08. Competitive Range Established	3 days
09. Negotiation Plan Approved	4 days
10. Negotiation Completed	30 days
11. Source Selection	14 days
12. Preaward Reviews Completed	7 days
13. Contract Awarded	3 days

Attachments:

TO: Chief
Contracts Branch, CPO

Through: (Name) Contract Specialist
Section _ , CB/CPO

_____ _____
Initials Date

(Name) Section Head and Contracting Officer
Section _ , CB/CPO

_____ _____
Initials Date

(Name, Title, Organization of Proposed
Program Officer's Immediate Supervisor

_____ _____
Initials Date

(Name, Title, Organization of Official
Responsible for Technical Proposal
Evaluation)

_____ _____
Initials Date

(Name, Title, Organization of Official
Responsible for Certifying Funds
Availability)

_____ _____
Initials Date

(Name, Title, Organization of Official
Responsible for Approving Contract
Projects)

_____ _____
Initials Date

FROM: (Proposed Program Officer's Name and Title)
(Proposed Program Officer's Section, Branch, Directorate)

SUBJECT: Acquisition Plan and Request for Contract for
" (Title of Project) "

The Contracts Branch, CPO, is requested to take all necessary actions to award (a contract or contracts) for the subject project pursuant to the attached plan. This document reflects the discussions between the undersigned and (name of Contract Specialist) conducted at our acquisition planning meeting(s) on (date or dates).

In accordance with the NSF Proposal and Award Manual Chapter 9, Acquisition Activities and Procedures, this action is properly assigned to the Contracts Branch because it is for contract action(s)

funded with Program funds and requires extensive program knowledge or close interaction between the program and acquisition staff as demonstrated by the attached.

The individuals who have signed or initialed this acquisition plan/request for contract transmittal memorandum confirm by their signature or initials that they have executed the one time "Procurement Integrity Certification for Procurement Officials" pursuant to Subsection 27(1) of the Act and Section 3.104-12(a)(2) of the Federal Acquisition Regulations.

The signature or initials on this transmittal memorandum also indicate that an effort was made to: (i) eliminate vagaries and ambiguities in the description of work, (ii) structure the work by phases or task whenever practicable, and (iii) ensure that the final description of work together with other planned contract requirements will provide the means for assessment of the contractor's technical, cost, and delivery performance. The work statement, reporting requirements, and technical evaluation criteria have been reviewed and agreed upon by the Contracting Officer and Program Officer and appear herein as they will appear in the solicitation.

(Signature of Proposed Program Officer)

Attachment